d.velop connect for Salesforce CRM: User

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1. d.velop connect for Salesforce CRM: User

1.1. Basic information on the application

In this chapter, you can find notes on the product and general information.

1.1.1. About d.velop connect for salesforce CRM

d.velop connect for Salesforce CRM is an innovative integrating application that seamlessly adds Salesforce to your CRM system and enriches it with information from your ECM system (Microsoft SharePoint or d.velop documents). It displays documents from the ECM system in standard or custom Salesforce objects based on the specific context.

1.2. Getting started

In this topic, you can learn about the basic functions of the application.

1.2.1. Uploading files

You can use **Upload files** to store up to ten files in your DMS at once.

This is how it works

1. Click **Upload files**.
2. Select up to ten files.
3. Select the document type.
4. Open the document properties by clicking **Edit**.
5. Change the document properties if necessary.
6. Upload the files by clicking **Save**.
7. Once the files are uploaded successfully, click **OK** to return to the document list.

Alternatively, you can move up to ten files using **Store files**.

1.2.2. Displaying the document list for a specific data record

Navigate to the relevant Salesforce data record and open the data record. You can find the document list under **d.velop documents**.

1.2.3. Useful things to know about viewing documents during editing

View and status

View offers you a preview of the selected document. By default, documents with the status **Release** are displayed if the document has this status. If the document also has the status **Processing** and you are the person editing it, the version with the status **Processing** is displayed by default. If the document only has the status **Processing**, for example, the version currently being edited is displayed by default. If no preview can be displayed or you are not authorized to view documents with the status **Processing**, you will receive a corresponding message. The colored bar above the displayed item indicates the status of the displayed version.

Let's assume you want to edit a document that has the status **Release**. Under **View**, you will see the green bar for this document. After you transfer this document to your editing process with **Start editing**, the status of the document changes to **Processing**. You will now see the document with the **Processing** status under **View**.

Versions

If you want to check which other versions of the document exist, switch to **Versions**. Each document that exists in different versions is displayed under **Versions**. Under **Versions**, you can also view the different versions of a document.

1.2.4. Finding documents in the document list

You can limit the document list displayed by default using a full-text search.

Let us say that the document list is very long and you do not find what you are looking for right away? You do, however, know a keyword that occurs in the document you are looking for.

This is how it works

1. Enter the keyword and press the **ENTER** key. The result list now only shows documents that match your keyword.
2. If the keyword does not yield the desired result, enter a different keyword and click **Refresh** to perform a new search. In this way, you can repeatedly refresh the document list.

1.3. Additional functions and settings

This topic covers additional functions that help you with your daily work with the application.

1.3.1. Filtering the result list

You want to filter the results within the document list.

This is how it works – Using predefined filters

1. In the column header of a property, click the downward arrow for filtering the results. A menu opens displaying a selection of all the available values in the selected column.
2. Select a value. The document list is limited to the results that display the selected value in the selected column.

The currently selected filter is displayed. You can remove the filter again using the cross icon. If you add an additional filter when a filter is already activated, the existing filter is overwritten.

This is how it works – Using custom filters

For more complex searches, you can set additional filter criteria using the funnel icon.

1. Click the funnel icon and add all the necessary filter criteria.
2. Click **Apply** to apply the filter criteria to the document results displayed. The filtering is not retained when you reload the result list.

Read here how to sort the result list: Sorting the result list.

1.3.2. Sorting the result list

You want to sort the results within the document list.

This is how it works

1. Click the column header of a property to sort the results.
2. Click the column header again to change the sorting.
3. Click on another column to cancel the previous sorting. The results in the selected column are sorted by data type (text, number, date). The sorting is not retained when you reload the result list.

Read here how to filter the result list: Filtering the result list.

1.3.3. Downloading files from the document list

In the document list, you can download individual documents and save them on your device.

This is how it works

1. Open the context menu for the document and click **Download**.
2. Define the storage location for the file. The file is downloaded through the browser.

Note that downloading of folders is not supported.

1.3.4. Sharing documents in Chatter

You can mention documents in Chatter directly from the document list.

This is how it works

1. In the document list, open the context menu of the relevant document and choose **Chatterpost**. A dialog window opens.
2. Configure your desired Chatter settings. The direct link to the document is automatically copied to the clipboard.
3. Add the link to the document by pressing **CTRL+V** in the **Post** area in the Chatter text field.
4. Click **Share**. The link leads directly to the document.

1.3.5. Sharing documents with people outside the company

If you want to allow people who do not have access to Salesforce or d.velop documents to view documents, you can share documents publicly.

This is how it works

1. In the document list, open the context menu of the document that you want to share.
2. Click **Share**.
3. Define the date up to which you want the link to be valid.
4. Click **Generate link**. The link is added to the clipboard and displayed in the dialog window.
5. Send the link to the person with whom you want to share the document.

1.3.6. Sending documents by e-mail

You want to send a document from the document list by e-mail.

1. In the document list, open the context menu of the document that you want to send and click **Send file by mail**. The document is automatically added as an attachment.
2. If you want to send additional documents, click the attachment icon (paperclip) in the text editor of the dialog and select one of two options via the two tabs:
   - **Record Files**: All files in the current data record are displayed.
   - **All files**: In this dialog, you can search the full text of documents and attach these documents to the e-mail. Select the checkbox in front of a document to add this document as an e-mail attachment.

1.3.7. Creating a new version of a document

You can upload a new version of a document.

Depending on the setting in d.velop documents, you may have to upload a file with the same file type for the new version.

This is how it works

1. In the document list, open the context menu of a document.
2. Click **Upload new version.** The document list is refreshed following the upload.

1.3.8. Editing document properties

In the document list, you can edit properties in the context menu of the document.

This is how it works

1. Open the context menu and choose **Edit attributes**. A dialog window opens.
2. Change the properties.
3. Choose **Save** to apply your changes.

1.3.9. Editing document list columns

You can edit the display of document list columns in a Salesforce record.

This is how it works

1. Click the gearwheel icon. A dialog window opens in which you can configure the document attributes and other settings.
2. Highlight an attribute.
3. Add the attribute to **Selected attributes**.
4. If necessary, you can change the order of the display using the arrow buttons. The selection is applied for the document type whose context you are in. Calling the component again in the same object context loads the configured settings again.
5. Choose **Save** to close the dialog. The document list is regenerated and displays the configured attributes.

1.4. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.